

FONDAZIONE  
LUIGI EINAUDI  
TORINO

BIL. 547



**olivetti**





## **The Olivetti Group CD-ROM**

### **Recommended configuration**

#### *Hardware*

Personal computer with i486SX 25MHZ microprocessor or higher  
8Mb (or more) RAM memory  
CD-ROM "dual speed" reader  
Audio board  
Loudspeakers

#### *Software*

MS/DOS 5.0 or later  
MS/Windows 3.1  
MS Video for Windows 1.0

#### *Installation*

1. Enter Windows 3.1 Program Manager environment
2. Insert the compact disc into the drive
3. Select File/Run and type [dev]: Installa.exe  
where [dev] identifies the CD-ROM device
4. Confirm (click OK) at the dialog box

### **Running the program**

1. Double click the "Gruppo Olivetti 1993" icon
2. To exit: press the keyboard "Control" key and click the USCITA/QUIT option  
(top right-hand corner of the main menu)



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# The Olivetti Group

1994







# The Olivetti Group

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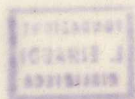


The information technology sector is undergoing a delicate transition.

The end of the 1980s closed a period of rapid growth and high profitability, and now the foundations are being laid for a new growth cycle.

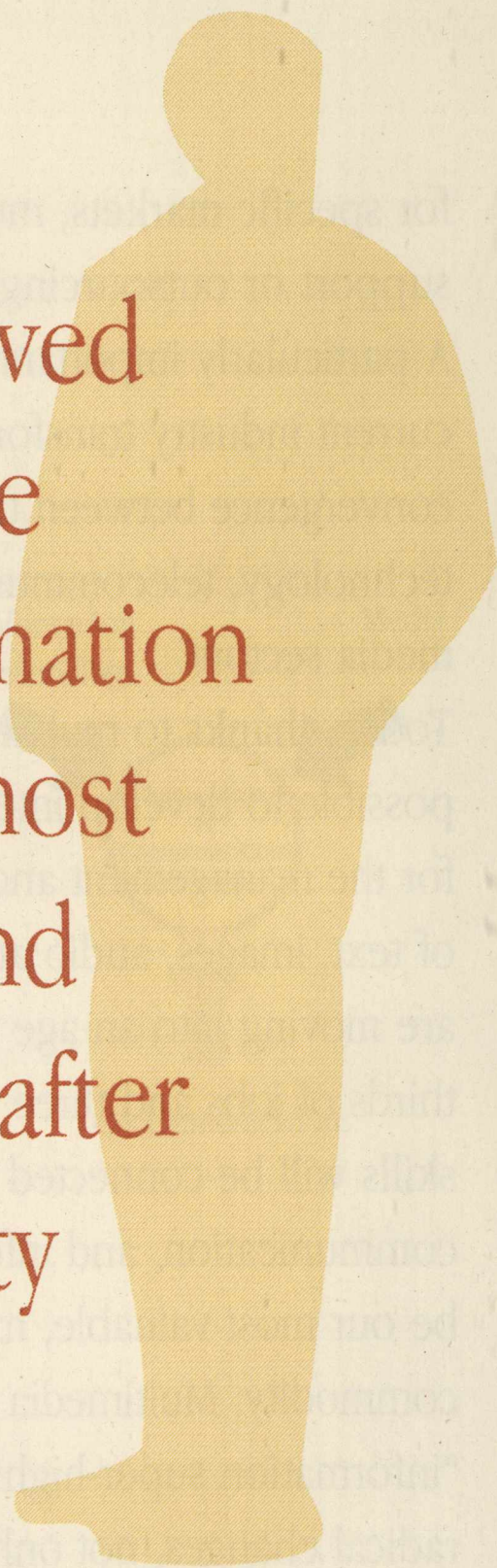
Falling prices have turned information technology into a mass market, a trend that has brought important economic and social changes and transformed the IT industry itself: vendors have become increasingly specialised, creating a segmented industry and fragmenting the IT offer.

On the other hand, demand for integrated solutions has opened up new opportunities for suppliers able to offer complete solutions





We have moved  
into an age  
in which information  
will be the most  
valuable and  
most sought-after  
commodity





for specific markets, multivendor support or outsourcing services.

A particularly important element in the current industry transformation is the convergence between the information technology, telecommunications and media sectors.

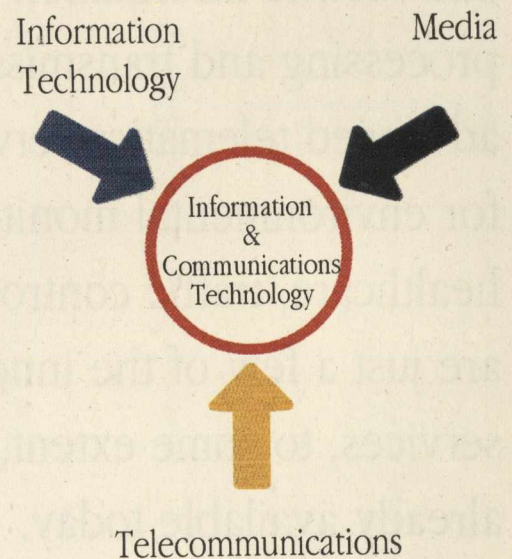
Today, thanks to multimedia, it is possible to develop integrated solutions for the management and transmission of text, images, audio and graphics: we are moving into an age in which two thirds of jobs and three quarters of skills will be connected with communication, and information will be our most valuable, most sought-after commodity. Multimedia and "information super-highways" will bring radical changes, not only in



technology, but in our working and life styles, too: they are leading us into an Information and Communications Technology age in which the traditional confines of time and space will be utterly transformed.

Everyone, whatever their location, will be able to access information anywhere at any time; and, if they wish, to be reached at any time.

This telecommunications system will foster the development of a pleasant new kind of “green” social environment. Information will tend to move, rather than people and/or goods. The key to these developments is the computer, even more than transmission networks.





The computer is turning into a universal communication tool, a Personal Communicator. Teleshopping, distance learning, videoconferencing, fixed and mobile information processing and transmission services, advanced telematics services for environmental monitoring, healthcare, traffic control: these are just a few of the innovative services, to some extent, that are already available today.

The computer industry itself will be transformed as new strategies are formulated and new alliances are drawn up.

The convergence between information technology and

From  
Personal  
Computer  
to  
Personal  
Communicator



telecommunications is opening up a vast new territory, which Olivetti, as a protagonist of the new information technology cycle, intends to explore and conquer.

**Carlo De Benedetti**  
Olivetti Chairman-Chief Executive Officer



# The co



company



In 1993 the Olivetti Group returned to growth, boosting its market share in Europe, attaining significant reductions in its operating costs and further strengthening its financial structure.



These results were achieved in a particularly difficult year for the economy and the IT industry, both in Italy and on international markets, which account for almost 70% of Group revenues.

Thanks to the far-sighted technological and commercial strategies implemented over the last few years, Olivetti today is a leading player in the European IT industry. It was the first supplier to focus on personal computers and the rapid move towards downsizing; to commit firmly to open systems and client-server architectures; to focus effectively on





Olivetti today is in an



excellent position

to respond to



the challenges



and enormous opportunities



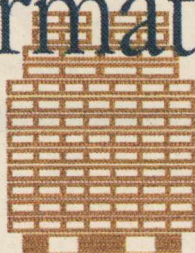
opening up



in the new



information technology industry

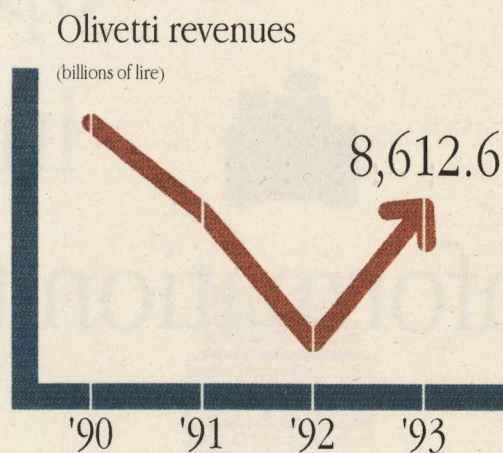




services, becoming the leading European supplier of multivendor services and developing an innovative offer in areas such as intelligent building services and outsourcing.

To bring its operating costs into line with the industry's rapidly shrinking margins, Olivetti took early steps to deal gradually with the inevitable job cutbacks, re-engineer its operating processes and create a division-based organisational structure guaranteeing effective links with the markets on which it has decided to strengthen or achieve a leadership position in Europe.

Today, through the convergence with telecommunications, information technology is turning into Information and Communications Technology, a



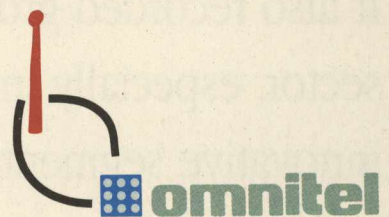


sector with huge potential.

Olivetti is already a key European player in this area, both through its role of new GSM network operator in Italy and in part through the investments and alliances it has already put in place at international level.

The challenge is similar to those Olivetti has met in the past: the transition from mechanics to electronics and, subsequently, from electronics to information technology. Once again, the “Olivetti recipe”, a mixture of an entrepreneurial style, corporate culture, professional skills and teamwork, will be the key to success.

**Corrado Passera**  
Olivetti Managing Director

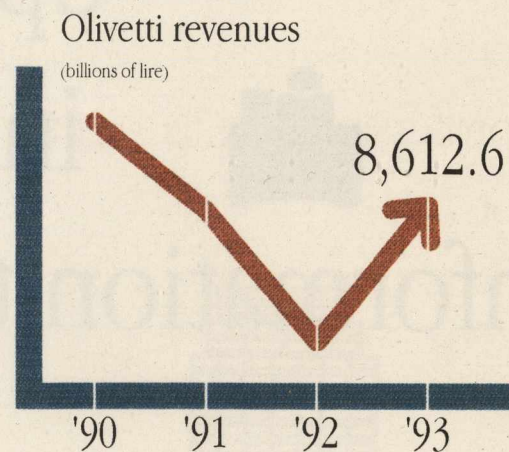




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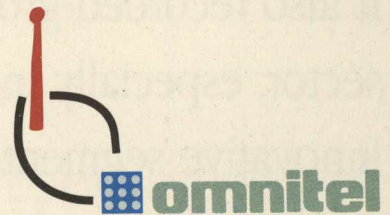


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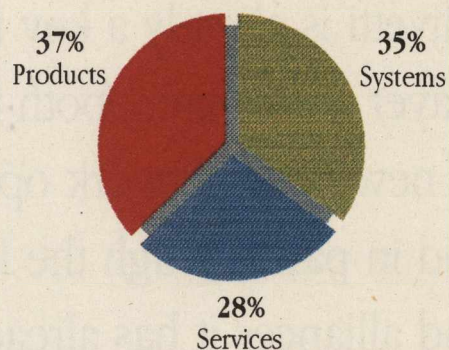




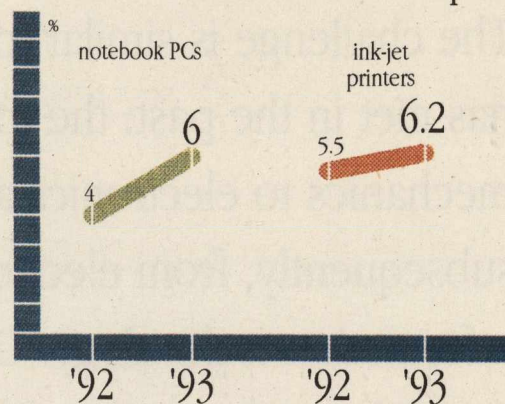
# Commercial results

Group revenues began to recover in 1993, reaching 8,612.6 billion lire. European personal computer market share rose from 6.2 to 6.5%(\*), with an even stronger improvement in the notebook segment. Market share in bubble ink-jet printers also rose. In the systems sector, Olivetti consolidated its lead in the Finance, Public Authorities and Retail markets. It also recorded growth in the services sector, especially in the more innovative segments.

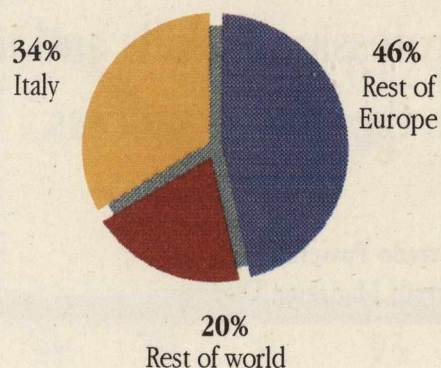
Revenues by business area



Olivetti market share in Europe



Revenues by geographical area



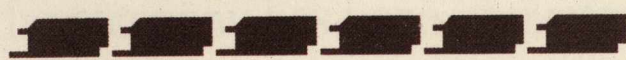
\* Dataquest estimates for the seven largest countries



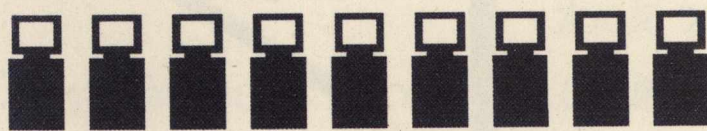
# Olivetti leadership



leading European manufacturer  
of personal computers and printers



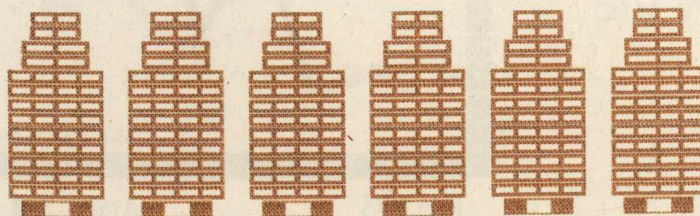
leading supplier in Europe of  
printers for specialised banking applications



leading European supplier of  
bank branch automation systems and self-service terminals



leading European supplier of  
multivendor support services



leading European supplier of  
services for intelligent buildings enterprise premises



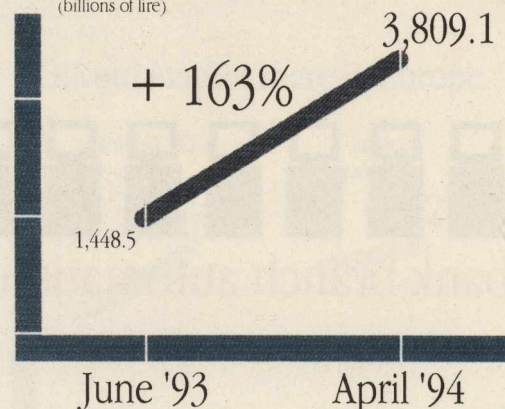
# Financial solidity

The Olivetti Group is one of the most financially solid players in the information technology industry.

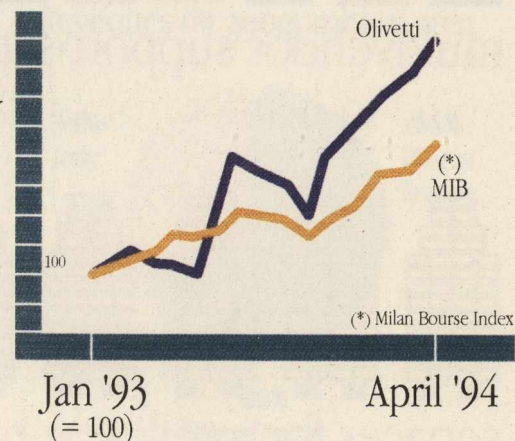
In 1993, Olivetti was the only information technology company to successfully implement a major capital operation, for a total amount of 903 billion lire. Performance on the stock market was extremely positive, with market capitalisation rising by 163% between June 1993 and the end of April 1994.

Olivetti's financial solidity was also reflected in a significant improvement in the net financial indebtedness/equity ratio (from 0.41 to 0.31) and by the confirmation of its positive liquidity/short-term debt ratio.

Market capitalisation  
(billions of lire)



Common share trend





# Quality and productivity

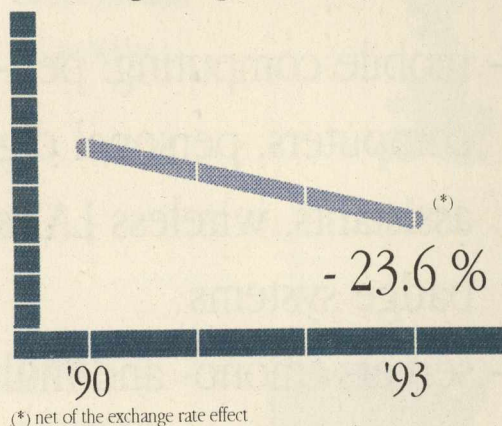
ISO 9000 certification and twelve leading quality conformity marks provide international confirmation of Olivetti quality. Over the past few years, the company has been implementing a wide-ranging programme to raise efficiency in specific areas:

- improvements in process quality
- rigorous control of operating costs
- structural rationalisation
- optimisation of production and logistics (results include decreases of up to 30% in personal computer time-to-market from 1992 to 1993).

Quality certification



Selling and general expenses



Time-to-market





# Research and development

Olivetti's R&D activities, performed by a worldwide network of laboratories and 3,300 specialists, focus on the differentiation of the offer at application level. Its most important work, conducted in centres in Italy, Britain and the United States, covers:

- mobile computing: pen-based computers, personal digital assistants, wireless LANs, active badge systems
- servers (mono- and multi-processor), personal computers and workstations for distributed network solutions
- extension of bubble ink-jet technology from printers to other office products



- self-service bank terminals and multimedia kiosks
- middleware, application environments and applications with object-oriented technologies on standard platforms: infrastructures for distributed systems, security, software development and integration tools, vertical-market applications
- interactive multimedia platforms for distributed environments, high-speed communication systems, advanced telecommunication systems and services, videoconferencing systems
- integrated intelligent building solutions.

#### **Italy**

- Ivrea
- Pisa
- Pozzuoli
- Bari
- Cosenza



#### **Great Britain**

- Cambridge



#### **U.S.A.**

- Cupertino
- Shelton





# Alliances

Over the years, Olivetti has built up an extensive international network of technological, industrial and commercial alliances. In 1993, telecommunications was a key area in the Group's alliance strategy: a major result was the formation, with some of the industry's leading world players, of Omnitel-Pronto Italia, which has been awarded Italy's second GSM wireless communications operating licence.





Telecommunication  
operators



Strategic alliances  
(Digital)

Expertise  
in

developing  
alliances



Systems partners  
and dealers



Industrial  
joint ventures

plays

a strategic role



Cooperation  
with technology  
leaders

in Olivetti's growth



Venture capital



Software houses  
System integrators



# Sales and support organisation

## Direct organisation

- 17,000 specialists in 48 countries, with special focus on large accounts
- Direct Marketing ("Olivetti Direct" programme)

## Indirect organisation

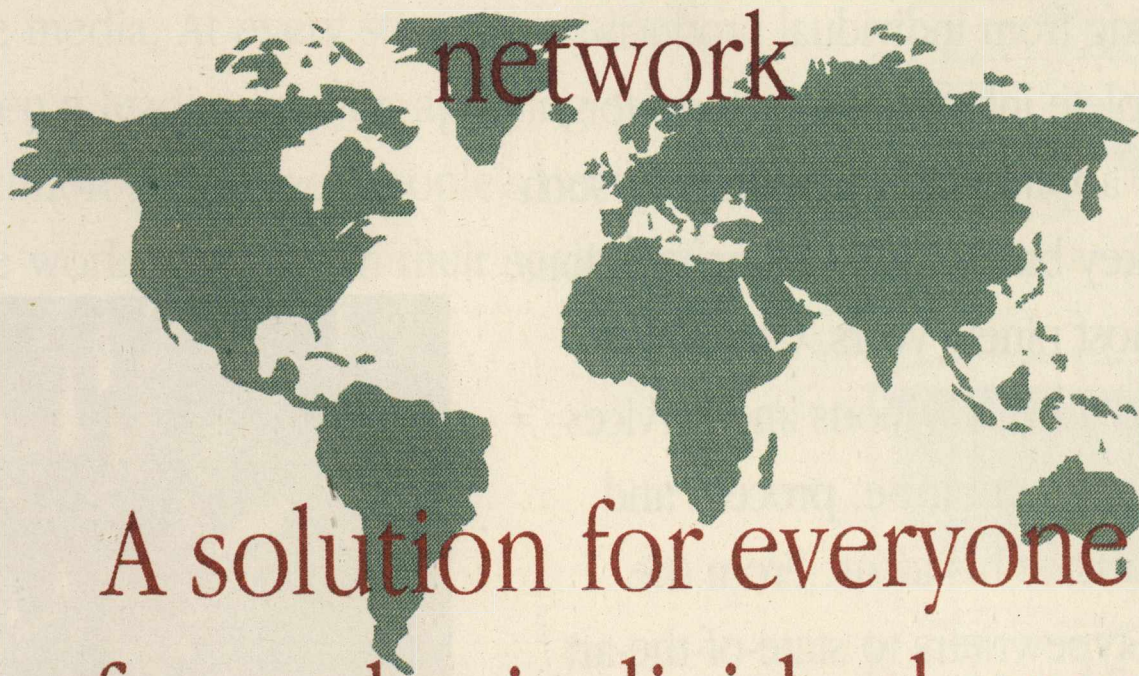
- 4,500 dealers
- 1,000 systems partners developing and distributing specialised applications
- mass merchandising and other channels for consumer product distribution
- agents and representatives in 40 countries not covered by the direct organisation.





# Olivetti

A worldwide  
distribution and service  
network

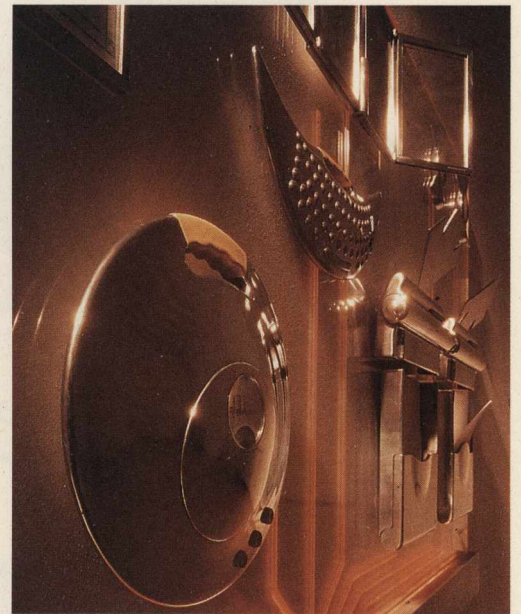


A solution for everyone  
from the individual user  
to the large organisation



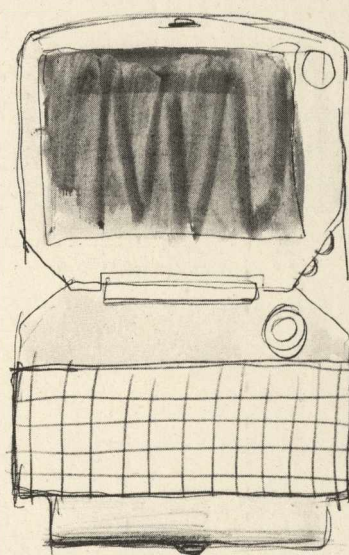
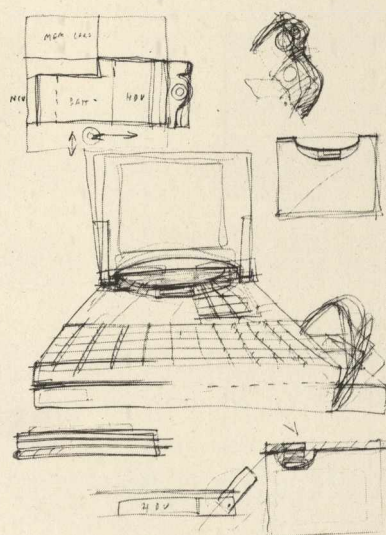
# Culture and innovation

One of Olivetti's distinctive features is the intellectual nature of its mission, which is reflected in its special attention to cultural activities such as the humanities, architecture, graphics, design. Design in particular is a hallmark of Olivetti's offer and corporate culture, extending from individual products to complete information systems for specific application environments, such as turnkey branch automation solutions. For almost ninety years, Olivetti has supplied tools, solutions and services to help man organise, process and communicate his ideas. From the earliest typewriters to state-of-the-art computers, Olivetti has helped people all over the world resolve the problems associated with intellectual activity.





It has moved successfully from mechanical technology to electronics and subsequently to distributed information processing. Today it is part of the new age created by the convergence between information technology, telecommunications and the media. At every step, Olivetti has been a leading player, applying technology to meet people's needs in the workplace and in their social and personal lives.





Culture and Innovation

# The



# offer



The Olivetti offer covers four areas: products, systems, services, telecommunications and multimedia.

**Products** include personal computers, servers, specialised workstations, printers, fax equipment and other office products.

In the **systems** area, Olivetti develops integrated application solutions for specific markets: finance, public authorities, retail. Its offer also includes specialised turnkey systems.



In the **services** area, Olivetti has built up an extensive offer comprising equipment support, professional services and system operations.

In the **telecommunications and multimedia** area, activities include telecommunication systems, telecommunication services, multimedia content, GSM wireless communications.



## Products

Olivetti's products offer is distinguished by a high rate of innovation.

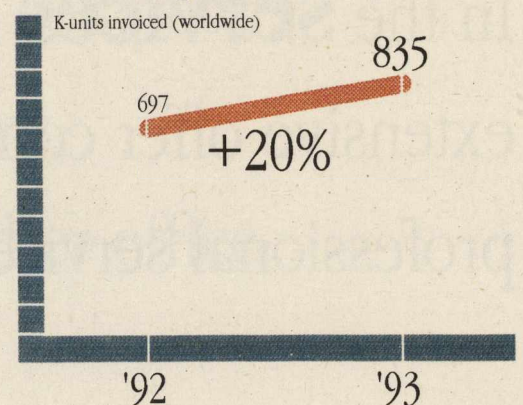
For example, 40 new personal computer models were introduced in 1993; at the 1994 Hanover Fair, Europe's leading IT tradeshow, Olivetti presented a total of 60 new models in its various product lines.

During 1993, Olivetti achieved significant increases in personal computer and printer shipments and improved its European market share in personal computers, printers and facsimile equipment.

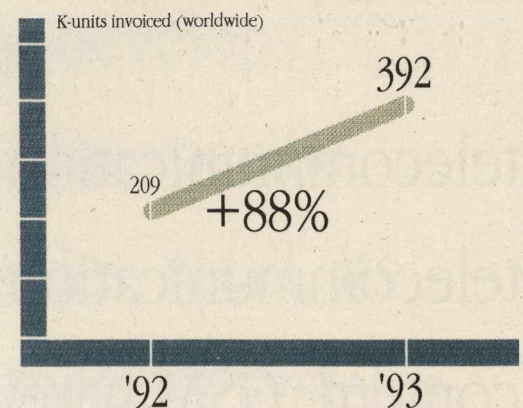
In the **personal computer** sector, the M6-Suprema line addresses the needs of business users looking for particularly advanced performance levels.

The M4-Modulo line is intended for

Olivetti personal computers



Olivetti ink-jet printers

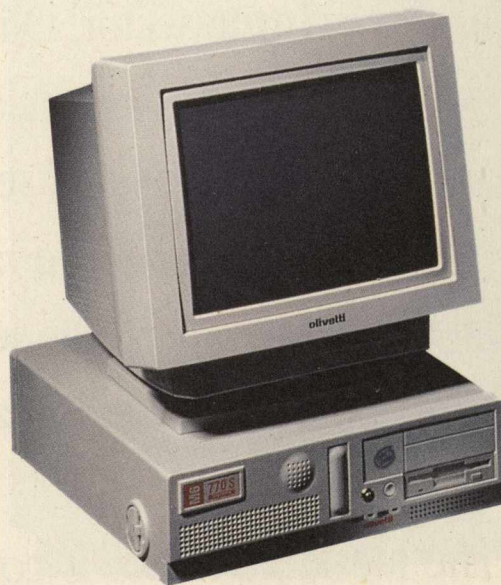




users for whom the price factor is an even more important consideration than quality and performance. Both the Suprema and the Modulo lines include models based on Intel's Pentium processor and configurations for multimedia applications (MPC - Multimedia Personal Computer - standard).

In the portable PC segment, Olivetti offers the Philos and Echos notebooks and the Olivetti Quaderno subnotebooks.

The home user market is addressed by the PCS and DomusLife ranges. The DomusLife models - Familia, Educator and Television - offer an extensive range of modules (CD-ROMs, sinto TV cards, audio, keyboards) and support





multimedia applications for the family, education and leisure activities.

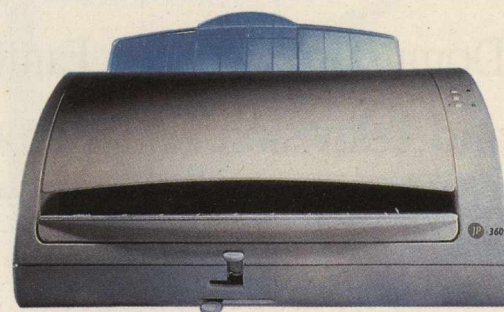
The **workstation** range based on DEC's Alpha-RISC technology is intended for advanced graphics work and technical and scientific applications.

The **server** line comprises mono- and multi-processor models for departmental and networking applications, based on Intel and Alpha-RISC chip technology (including Intel's Pentium).



In the **printer** sector, Olivetti offers bubble ink-jet models (also in portable and colour versions), laser printers and dot matrix printers. The range also includes specialised models for banking, retail, ticketing and other applications.

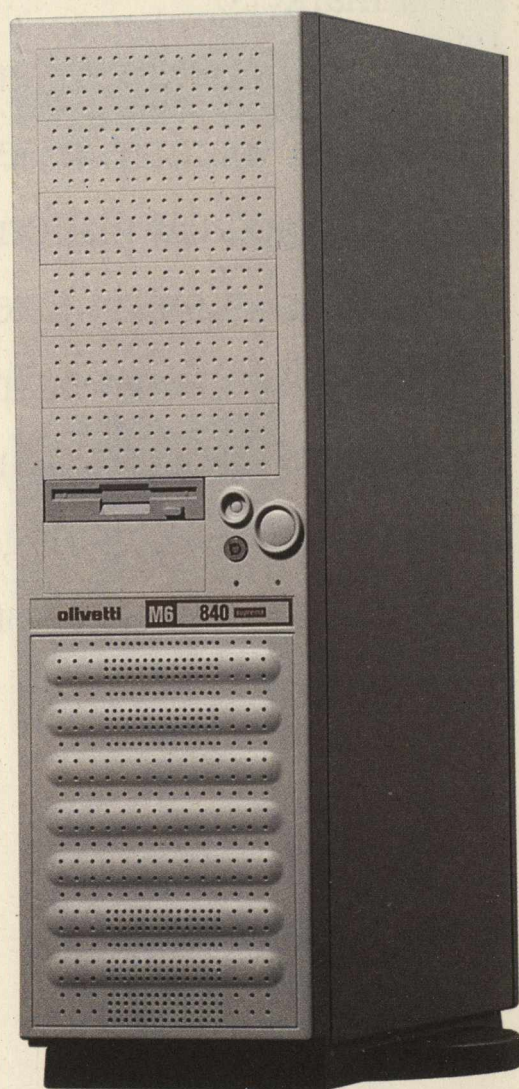
The facsimile sector is covered by a





wide selection of high-performance machines, including plain-paper bubble ink-jet and laser models.

Consumer and **office products** such as typewriters and videotyping systems, copiers, cash registers, calculators, electronic diaries and supplies complete the Olivetti catalogue.





# Systems

The systems offer puts the experience and skills Olivetti has built up over the years at the service of large users in the Finance, Public Authorities and Retail markets.

This is an innovative offer of distributed application solutions based on open, standard, modular platforms.

Olivetti also offers an extensive range of turnkey solutions for special applications such as testing, access control, security, ticketing, lotteries, teller automation, transport management.

## Olivetti worldwide installations

### BANKS



60,000 branches of 4,900 banks

### PUBLIC AUTHORITIES



42,000 public offices

### RETAIL



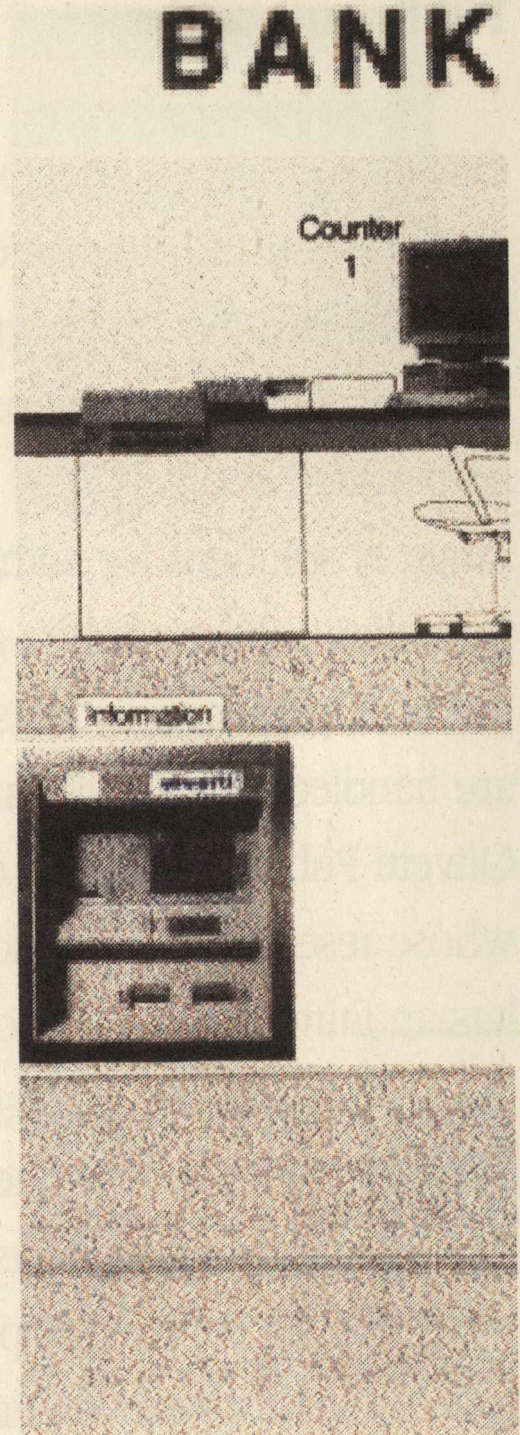
100,000 cash-desks



## Finance

This offer is intended specifically for branch automation needs: teller and back-office systems, branch information systems, local and wide area networking, self-service equipment.

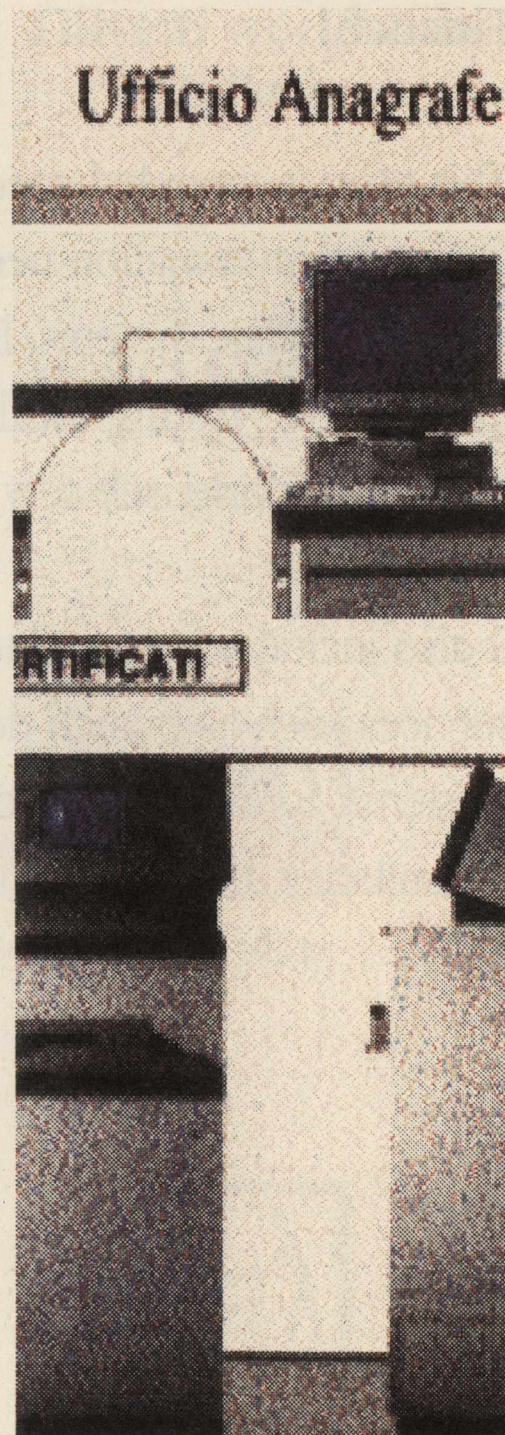
It also includes a complete range of services such as branch design (systems, furnishings, layouts), consultancy, training and security.





## Public authorities

Olivetti's public authorities offer, which complies with EU regulations, consists of office information systems - intended in particular for automation of administrative procedures - and a wide range of solutions for authorities providing services for the general public. Operations in this sector in Italy are handled by a special unit - the Olivetti Public Authorities division - whose research and development work has an European scope. Solutions have been developed for emergency call dispatching, the environment, healthcare and other application areas. Olivetti is the leading supplier of products and systems to European Union offices.





## Retail

Olivetti's offer for the retail sector - department stores, supermarkets, hypermarkets - consists of solutions to integrate management of cash-desks, back-store activities and communications with head office, banks and suppliers.

Important enhancements have been introduced with the use of multimedia kiosks. A specific turnkey offer is available for the fuel-station sector, providing management of cash-desks, back-store activities and mini-markets, together with a range of additional services for forecourt management and payment management.





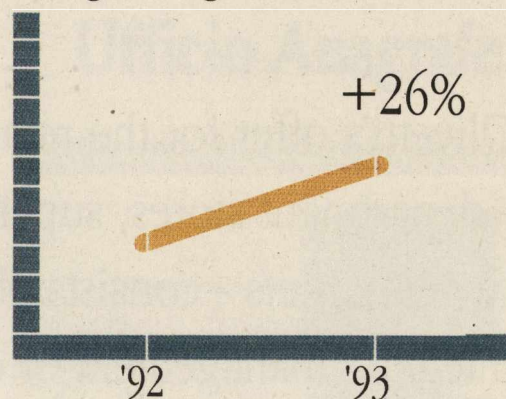
# Services

The “service” factor is becoming more and more important in the overall value of IT solutions. In 1993, Olivetti introduced important enhancements to its wide-ranging services catalogue for innovative areas such as professional services, multivendor support, engineering services (wiring, intelligent buildings) and outsourcing (full or partial management of the customer’s IT installations).

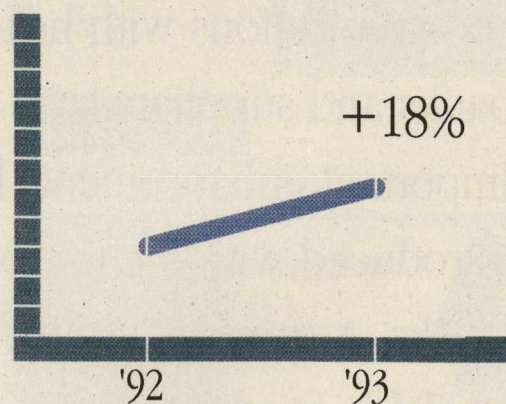
Olivetti is the leading European supplier of intelligent building systems and multivendor services.

Its services offer covers three main areas: maintenance services, professional services and outsourcing services.

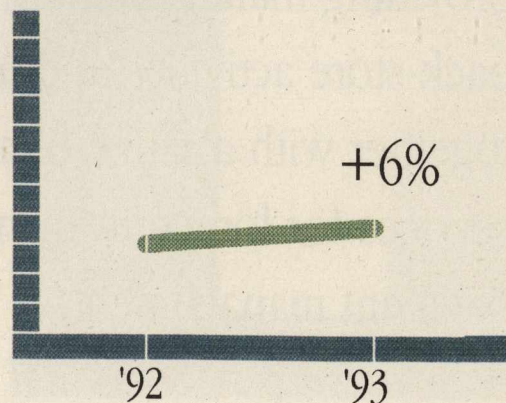
Engineering services revenues



Professional services revenues



Multivendor services revenues





**Maintenance services** - including multivendor services - are based on advanced organisational concepts and technologies. An international coordination centre supported by sophisticated information systems and expert systems runs telediagnosis and call management operations that ensure top-quality, rapid assistance. Dedicated databases store and classify calls for assistance and the solutions provided, while a telephone hot-line is available to provide immediate help.

**Olivetti  
services  
worldwide**

**10,000  
specialists**

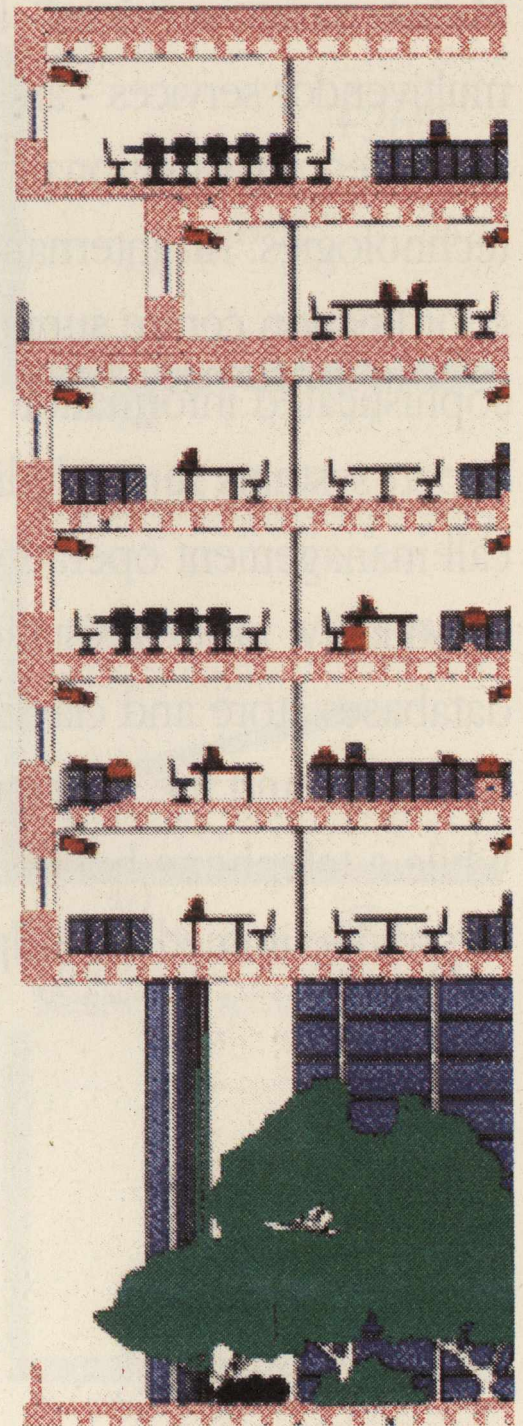
**400 support  
centres**

**250,000  
customers**



## **Professional services** include:

- consultancy
- training in areas such as organisation, technological processes, use of IT techniques and tools
- LAN management and software support: software maintenance, system administration and related activities
- enterprise premises services including wireless LANs and active badge systems.





The **outsourcing services** offer (processing services, network services and others) is based on a transmission network operating throughout Europe, and seven EDP centres in major European countries. Desktop facility management is a particularly important area of activity.



# Telecommunications and Multimedia

Telecommunications and multimedia is the latest entry in the Olivetti catalogue. By identifying strategic business areas, organising the know-how already available in the Group and strengthening its international alliances, Olivetti has defined an offer which includes:

- **telecommunication systems**

(private voice/data networks, electronic fund transfer systems, multimedia technologies and applications) through Sixtel/Sixcom, the Olivetti Research laboratories in Cambridge and participation in ATM Ltd.

- **telecommunication services**

through SEVA for value-added



services, the Geonet network run by Syntax Processing, cooperation with Hughes (USA) for satellite services and the Fast Data Broadcasting initiative with the RAI, Italy's state broadcasting authority

- **multimedia content** (electronic publishing, information, interactive catalogues) through Radiocor, the Redgate Olivetti Communications joint venture and Opera Multimedia, which specialises in multimedia publications in fields such as the arts, history, ecology, sciences and tourism.





Omnitel-Pronto Italia, in which Olivetti is the main shareholder, has been awarded Italy's second network operating licence in **GSM wireless telephony** (a strategically important sector for the Group). Thanks to the international technological and application competences of its partners, Omnitel-Pronto Italia can offer the highest service levels.

The company's strategic mission is to build a digital network infrastructure offering integrated mobile voice and data facilities and value-added services to broad categories of users, a first step towards the development of gateways to the "information super-highways". This vision is in line with the major transformations taking place

## Omnitel Pronto Italia

### *The project*

- A high quality national network
- Investments totalling more than 2,000 billion lire
- An operating structure providing full territorial coverage

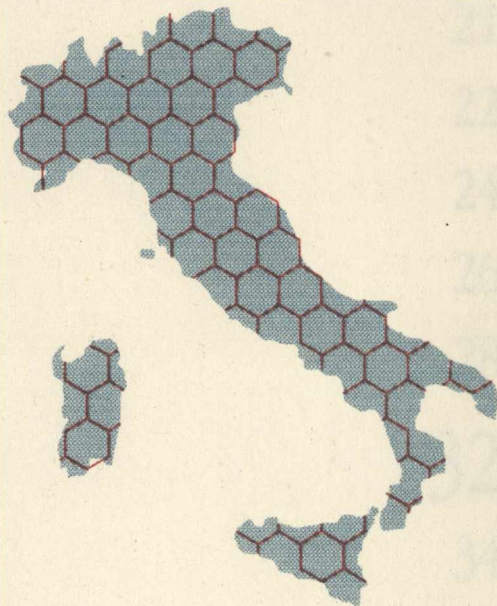
### *The Shareholders*

Olivetti  
Bell Atlantic  
Cellular Communications Int.  
Lehman Brothers  
Mannesmann  
PacTel (Air Touch)  
Telia  
Banca di Roma  
Other Italian partners



in international telecommunications services: digital techniques have acted as a catalyst for a convergence between information technology and telecommunications, fuelling the development of integrated digital service networks for both corporate and private users.

## OMNITEL PRONTO ITALIA









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## The scenario

## The company

Commercial results

Financial solidity

Quality and productivity

Research and development

Alliances

Sales and support organisation

Culture and innovation

## The offer

Products

Systems

Services

Telecommunications and Multimedia











## **The Olivetti Group**

The Olivetti Group is a major international player in the information technology industry. It also has extensive operations in the new Information & Communications Technology market created from the convergence between IT, telecommunications and the media.

It is the largest European producer of personal computers and printers, and the leading European supplier of bank branch automation systems, self-service bank terminals, multivendor services and integrated intelligent building systems.

In 1993, the Group achieved revenues of Lire 8,612.6 billion. It has 35,000 employees. The direct sales and service organisation consists of 17,000 specialists in 48 countries and is flanked by agents and representatives in another 40 countries and a network of 5,500 dealers and systems partners.

Research and development laboratories operate in Europe, the Far East and the United States, while the Group's main manufacturing facilities are located in Italy, the Far East and Latin America.

Olivetti has built up an extensive international network of technological, industrial and commercial alliances. In the telecommunications field, in particular, it has a majority stake in Omnitel-Pronto Italia, whose shareholders include some of the world's leading telecommunication players. In March 1994, Omnitel-Pronto Italia was awarded Italy's second GSM wireless communications operating licence.

The Olivetti offer covers four areas: products, systems, services, telecommunications and multimedia.

Products include personal computers, servers, specialised workstations, printers, facsimile equipment and other office products.

In the systems area, Olivetti develops integrated application solutions for specific markets (finance, public authorities, retail) and specialised turnkey systems.

The services offer covers multivendor equipment support, professional services, enterprise premises services for intelligent buildings and outsourcing.

In the telecommunications and multimedia area, Olivetti's activities include telecommunication systems and services, multimedia content (publishing, interactive catalogues) and GSM wireless communications.



